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ABSTRACT

Educational dissemination is a way to foster changes in educational practice. Peer interaction is a special type of dissemination in which people with certain roles and responsibilities help others with the same or similar roles and responsibilities. This involves teachers helping teachers, principals helping principals, business representatives helping others in business and so forth. The primary purpose of this guide is to describe a regional career education peer assistance model and to share what was learned in creating the model with others wanting to use such a model. The guide is especially aimed at the following groups: (1) career education coordinators at state, intermediate, and local levels; (2) operators of multistate dissemination services such as regional exchanges and vocational curriculum management centers; (3) state dissemination specialists, such as state facilitators, capacity-builders, and talent bank directors; and (4) representatives of labor, business, industry, and government. The guide covers the following topics: model overview; selecting the consultants; promoting the service; training the consultants; making the system work; considerations in establishing peer assistance models; and a review of the literature on peer interaction. (KC)

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The Northwest Connection

People Helping People

A Guidebook on Dissemination through Peer Interaction

by
Robert E. Blum
and
Greg Druian

CE 028 781

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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A project of the Northwest Regional Educational Laboratory
sponsored by the U.S. Office of Education, Office of Career Education

The Northwest Connection
A career education consulting service for Alaska, Idaho, Montana, Oregon and Washington.
Supported by the U.S. Office of Education, Office of Career Education

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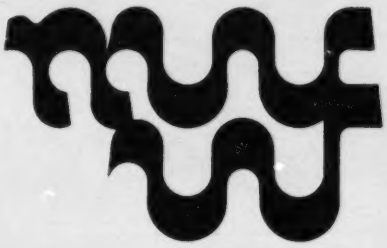
Title VI of the Civil Rights Act of 1964 states: "No person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance." Title IX of the Education Amendments of 1972, Public Law 92-318, states, "No person in the United States shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any education program or activity receiving Federal financial assistance." Therefore, career education projects supported under Sections 402 and 406 of the Education Amendments of 1974, like every program or activity receiving financial assistance from the U.S. Education Department, must be operated in compliance with these laws.



a career education consulting service for alaska, idaho, montana, oregon, and washington

the northwest connection

Dear Career Educator:

Educational dissemination may be thought of as a way to foster changes in educational practice. Peer interaction is a special type of dissemination in which people with certain roles and responsibilities help others with the same or similar roles and responsibilities. This involves teachers helping teachers, principals helping principals, business representatives helping others in business and so forth. Peer interaction may be direct, as in face-to-face interaction, or indirect, as in mailed materials. The essential ingredient is that people get assistance from practitioners like themselves.

The Northwest Connection was created to demonstrate a regional career education peer assistance model and to communicate the results of the model to others who are concerned or responsible for dissemination of career education.

The primary purpose of this guide is to describe the model and to share what was learned in a way that will help others wanting to use such a model. Particular groups who will find this guide useful include:

- Career education coordinators at state, intermediate and local levels
- Operators of multistate dissemination services such as regional exchanges and vocational curriculum management centers
- State dissemination specialists, such as state facilitators, capacity-builders, and talent bank directors
- Representatives of labor, business, industry and government.

The Northwest Connection has been an exciting and challenging experience for the persons involved in it. We hope this guide will make a contribution to the establishment of new connections.

Robert R. Rath, Executive Director
Northwest Regional Educational Laboratory

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SECTION 1: The Northwest Connection: An Overview of the Model

In a consultation with a district pupil personnel director and district counselors, I learned that they were discouraged about career education because of lack of administrative leadership and support. I believe I helped them understand that they were already active in career education and that through building level organization and individual enthusiasm, they could put a viable program into effect. They seemed to appreciate knowing that help is available close to home. I think this whole experience demonstrates the power of professional sharing and is a good example of what the Northwest Connection is all about.

Senior High Counseling Consultant

The Northwest Connection (NWC) was a joint effort by the State Departments of Education in Alaska, Idaho, Montana, Oregon and Washington and the Northwest Regional Educational Laboratory to establish a regional career education consulting service. One of several projects funded through the U.S. Office of Education, the goal of the Northwest Connection was improvement of both the number and quality of career education experiences for students.

The core of the project was to make the services of 58 consultants available to anyone in the five-state region interested in improving career education. Services included telephone consultation, materials sharing and onsite assistance. The model of the Northwest Connection service process is shown in Figure 1-1 below. The project started in late 1978. Consultant services began in March 1979, and services were provided in the region through August 1980.

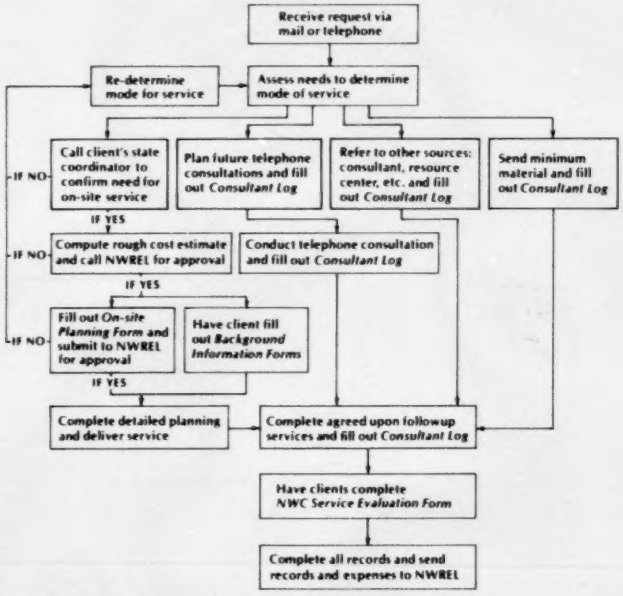
Receive request via mail or telephone
Re-determine mode for service
Assess needs to determine mode of service
Call client's state coordinator to confirm need for on-site service
Plan future telephone consultations and fill out Consultant Log
Refer to other sources: consultant, resource center, etc. and fill out Consultant Log
Send minimum material and fill out Consultant Log
IF NO
IF YES
Compute rough cost estimate and call NWREL for approval
Conduct telephone consultation and fill out Consultant Log
Fill out On-site Planning Form and submit to NWREL for approval
Have client fill out Background Information Forms
Complete detailed planning and deliver service
Complete agreed upon followup services and fill out Consultant Log
Have clients complete NWC Service Evaluation Form
Complete all records and send records and expenses to NWREL

FIGURE 1-1:
Northwest Connection Service Process

Who Were the Consultants?

Northwest Connection consultants were carefully screened and selected from nearly 200 candidates from the Northwest region. Each consultant had achieved distinction in at least one specialized area of career education. The pool of consultants included teachers; school specialists and counselors; school administrators; representatives of youth-serving organizations/ business, labor and community representatives.

What Services Did the Consultants Offer?

Consultants received training in using systematic procedures to help clients improve career education. Consultants worked with clients by telephone and in person to:

- diagnose needs
- plan action steps
- deliver services
- provide followup
- evaluate accomplishments

Clients and consultants worked together to determine the most appropriate type of service. Figure 1-2 describes the service request process.

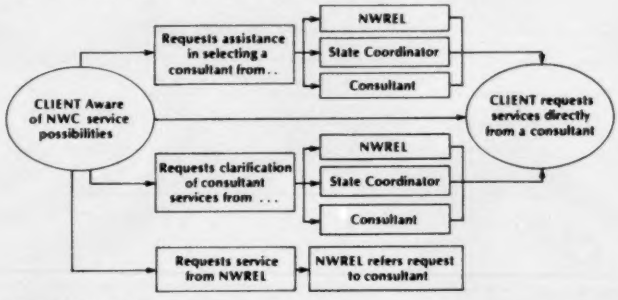

FIGURE 1-2:
Northwest Connection Service Request Process

How Was Onsite Assistance Delivered?

Because onsite assistance is expensive and takes consultants away from their regular jobs, a system was developed to help limit and prioritize onsite visits. Priorities were ordered so that consultants would spend most of their time with small groups of peers at a single school building, the target of efforts to improve career education. Despite budget constraints, consultants were able to fulfill nearly all requests. Once an onsite visit was approved, the Northwest Connection paid all consultant charges, including travel and per diem. No consultant fees or honoraria were paid. Consultants used the priorities listed below to plan onsite visits.

Priority 1: An action planning team with broad school and community representation

Priority 2: A group of teachers and specialists in one school
or
A community organization that has involved the top administrators from a local school

Priority 3: A group of administrators from different schools

Priority 4: A group of teachers and specialists from different schools

Priority 5: Large groups such as subject area associations

Priority 6: Small groups or individuals in schools or communities

What Were the Results of the Model?

The Northwest Connection had a broad range of effects, organized below into three categories: how clients used services, how they perceived the impact of the services and how consultants benefited.

Consultant services were used:

- by groups of teachers in workshops and inservice events to plan and develop classroom activities
- by intermediate districts and resource centers to help local districts meet career education needs
- to help school districts and teachers implement career education requirements of state career education plans
- to help local district staff develop and implement career education plans
- by teachers to locate ideas and materials for use in the classroom
- by teachers and administrators to find out about career education
- by CETA staff to learn how career education meets the needs of CETA-eligible students
- by district career education coordinators to increase their repertoire of available materials

Clients who received onsite services felt that consultants were well prepared, enthusiastic, gave personal attention to their needs, provided helpful materials and displays, and provided followup assistance by telephone.

Clients mentioned these changes that took place as a result of consultant site visits:

- career educational teacher training programs
- school-wide career education programs
- expanded career education programs
- increased staff interest in career education

Consultants benefited in four principal ways from participation in the Northwest Connection.

- They developed skills of providing effective consultation.
- They increased their number of professional contacts.
- They renewed their enthusiasm for career education.
- They increased their knowledge of available resources for implementing career education.

SECTION 2:
Selecting the Consultants

The teachers in Naknek, Alaska told me they really appreciated working with a teacher from another district since they rarely have visits from anyone but Department of Education people. They need contacts with other districts. Since our onsite visit we have continued to correspond, and when they get into town they know where to get help.

Vocational Counseling Consultant

The heart of a peer assistance program is the people selected to provide help–the consultants. The better the consultants, the better the assistance. The more experienced the consultants, the sooner assistance can be offered with some assurance of quality. The process and criteria established to select the consultants will help determine how soon the program can begin to deliver effective service. Allow adequate time and thought for questions like these:

1. Where can potential consultants be found?
2. What information will be needed to choose consultants and how will it be gathered?
3. What will be the benefits to and expectations of consultants–how will the benefits and expectations be communicated to potential consultants?
4. What areas of specialization should consultants have?
5. What criteria and processes will be used to choose consultants?
6. How will those selected and not selected be notified and will commitments be reaffirmed?
7. How long will it take to have the consultants on board?

Finding Consultants

The people you are looking for may be in schools, businesses or other agencies that have been active in promoting changes you are seeking. Be sure not to overlook places where involvement and activity have been effective, though perhaps not in the spotlight. In the Northwest Connection, the search for nominations and applications proceeded in several ways. State level career education coordinators were asked to nominate both consultants and persons who could nominate consultants. Local career education coordinators and directors of funded career education projects were asked to nominate consultants and to apply themselves, if appropriate. Each member of the project steering committee, business persons with an interest in career education and representatives of organized labor were approached.

Eight weeks were allowed to receive applications from potential consultants. Over 200 applications were received. Some categories had as many as 15 applicants and others had as few as one. An additional three weeks was needed to increase the number of applications in specialty areas with only a few. As a result of the followup, each specialty had at least two applicants.

Information for Choosing Consultants

The information gathered during the application process provides the basis for selection. Enough is needed to enable a choice among applicants, but there is a limit to what applicants will provide and what can be processed reasonably in the screening process.

For the Northwest Connection, information was gathered from applications and from state and local career education coordinators and project steering committee members. All information was used in selecting consultants. The basic technique used to collect information was a structured application form with open-ended questions. Figure 2-1 illustrates a part of the questionnaire. The form also asked applicants to commit time to the project without pay and to get approval of their supervisors for their participation in the project. Figure 2-2 shows the form the supervisor signed. No attempt was made to talk with references given by every applicant, but references were called in cases where the competition was close. Time and resources did not allow interviews with each applicant, but some were called to clarify information on their application.

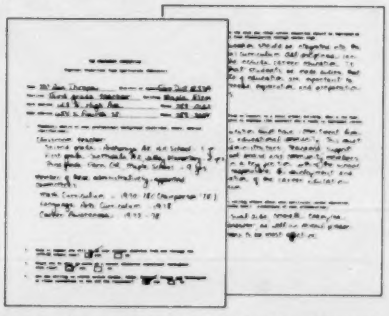

FIGURE 2-1: Consultant Application Form

Benefits and Expectations

To get the best efforts from consultants, they must see their role as personally and professionally worthwhile. You will need to think about the benefits of the role and be able to explain them to consultants and others. You must be very clear about what you expect from consultants. You might consider questions such as these: Will consultants receive pay? What expenses will be paid? Is training provided? Is there the possibility of new professional relationships? How much time is expected of consultants both for preparation and delivery of services? How often will consultants be away from their regular jobs? Will support services be available? Precise benefits and expectations should be communicated to potential applicants as early as possible–preferably in the letters requesting application. Nominees can use this information to decide whether or not to apply.

Benefits offered to Northwest Connection consultants were professional and personal growth through training, travel and contact with others in a five-state region. Consultants were volunteers who spent much of their own time on project tasks. School districts were paid for substitute teachers if consultants were away from teaching duties. Pay for replacement employees was not necessary for nonteaching school personnel or consultants from business, labor and other organizations.

Consultants were asked to spend up to 25 days spread over 15 months on project activities. They were not asked to assume any expenses.

ENDORSEMENT OF KEY ADMINISTRATOR

I understand that _____ of my staff has been invited to apply to be a member of a select group of career education specialists from Alaska, Idaho, Montana, Oregon and Washington linked together in a project known as The Northwest Connection.

As an administrator with some familiarity with her/his competence, both in career education and as a communicator, I would agree we have a staff resource here that we're willing to share with others.

Should she/he be selected, I understand that each regional consultant will be asked to:

1. Attend a week-long (five work days) training session in late February or early March
2. When convenient for all concerned be "on call" for telephone/mail and onsite assistance (one to three days each trip) beginning in March, 1979 and extending through most of school year 1979-80

Our district would _____ would not _____ expect reimbursement for a substitute's pay when this person's classroom is uncovered. Our substitute pay including benefits is approximately _____ per day (project funds are available if needed).

If you select our candidate for this slot in The Northwest Connection team, I will help obtain our district superintendent's final approval.

_____

Principal/Supervisor

FIGURE 2-2: Administrator's Release Form

Areas of Specialization

In a peer assistance program, it is important for consultants to have specialties that are like those of the people they will be helping. In other words, teachers should help teachers, administrators help other administrators and business people help business people. This likeness gives consultants a special credibility. If people selected already have the skills and knowledge needed to deliver services offered, training time can be minimized and service can be offered almost immediately.

The NWC funding agency, the Office of Career Education, required that the project have consultants in each of 50 specialty areas, listed in Figure 2-3.

Northwest Connection consultants were selected for their skill, knowledge and experience in delivering career education experiences through their specialty areas. We did not require that applicants demonstrate consultation skills because the NWC project included training in those skills.

Criteria and Processes for Choosing Consultants

The criteria applied in the screening and rating process determines what the consultants will be like. Criteria should be established early, reflect what a consultant will actually be doing and be applied consistently during screening and rating. Some thought should be given in advance to questions of how quality for each criterion will be judged, whether some criteria will be more important than others, whether all criteria are relevant to all applicants and whether the criteria can be applied within time and resource limits.

To screen NWC applicants, two types of criteria were used. The first related to the background, experience and capabilities of the applicant and the second had to do with establishing balance and equity in the consultant group.

Criteria we used included knowledge of how to implement career education, knowledge of the career education concept, amount and nature of previous career education consulting experience, amount and nature of involvement in career education activities at local, state and national levels, type of career education materials developed and available, willingness to serve under the conditions of the project and supervisor concurrence on participation.

The selection process should be feasible and fair. You may need to decide whether there will be prescreening to reduce the number of finalists, who will review, rate and screen applications, what the timeline for completing the selection process will be and who will make the final decisions. You should also decide whether there will be an appeals process.

The Northwest Connection Steering Committee reviewed, rated and recommended the final list of consultants. Steering committee members included the career education coordinator from each participating state, a career/vocational educator appointed by the state coordinator and the directors of two Oregon organizations which have been closely involved with career education–Institute for Public Affairs Research (IPAR) and the Interinstitutional Consortium for Career Education. Final decisions were made by the project director and the USOE project officer. All applications were reviewed by project staff and were placed in one of the consultant categories. A three-member team reviewed and rated each application, the ratings were averaged, the team discussed the applicants, if necessary, and then recommended the first, second and third ranking applicants in each category. The total steering committee reviewed and discussed the recommendations and considered the criteria for making the consultant group balanced. As a final step, the USOE project monitor reviewed the recommendations to reach agreement with the project director on the top applicant in each category.

Notifying Consultants

The individuals chosen as Northwest Connection consultants were notified before those who were not selected, in case a first choice declined to participate. The consultants were notified by mailgram. This technique was fast and it gave the notification a sense of importance. The mailgram was followed with a letter that laid out the upcoming events. Individuals who were not selected as consultants were notified shortly after those chosen, and were praised for their good qualities, told of the keen competition, given the name of the person selected in their category and asked to assist the person if at all possible. Remember that it is as important to notify those not selected as it is to notify those chosen. Positive statements to each person who applied pay dividends in acceptance of the results.

We also notified consultants' supervisors. A letter was sent congratulating the organization on having such excellent employees and asking them to reaffirm agreement for their employee to participate. News releases were used, too.

Bringing Consultants on Board

The selection process should not be rushed. Excellent people may be missed if the process is done too quickly. It takes time to solicit nominations from agencies you may not work with on a daily basis. Allow time to develop contacts and to follow through with them.

Consultant selection in the Northwest Connection Project took five months from the time of project start-up. Search and application took two and one-half months, screening and selection took one month, locating additional applications in some categories took another one and one-half months.

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1. Kindergarten teachers
2. First grade teachers
3. Second grade teachers
4. Third grade teachers
5. Fourth grade teachers
6. Fifth grade teachers
7. Sixth grade teachers
8. Junior high English teachers
9. Junior high social studies teachers
10. Junior high math teachers
11. Junior high science teachers
12. Junior high industrial arts teachers
13. Junior/senior high home economics teachers
14. Junior high business teachers
15. Senior high English teachers
16. Senior high math teachers
17. Senior high social studies teachers
18. Senior high science teachers
19. Senior high vocational education teachers
20. Junior/senior high media specialists
21. Elementary school special education teachers
22. Junior/senior high special education teachers
23. K-12 teachers involved in mainstreaming for handicapped students
24. Elementary school specialists for the gifted and talented
25. Junior/senior high specialists for the gifted and talented
26. Junior high counselors
27. Senior high counselors
28. Junior/senior high physical education teachers
29. Junior/senior high art teachers
30. Junior/senior high music teachers
31. School librarians, K-12
32. Elementary school principals
33. Junior high school principals
34. Senior high school principals
35. Junior/senior high foreign language teachers
36. Junior/senior high work experience educators
37. Occupational placement specialists in K-12 programs
38. Specialists in reducing sex stereotyping in career education
39. Specialists in reducing race stereotyping in career education
40. Specialists in reducing stereotyping of handicapped students
41. Parents
42. Persons from small business
43. Persons from large business/industry
44. Persons from organized labor
45. Members of local school career education advisory committees
46. Persons from business organizations supporting education (e.g., Chamber of Commerce, Business and Professional Women's Clubs, etc.)
47. Persons from community service organizations (e.g., American Legion, Rotary, Women's American ORT, etc.)
48. Persons from organizations representing special populations (e.g., NAACP, ASPIRA, National Congress of American Indians, etc.)
49. Persons from youth-serving organizations (e.g., Boy Scouts, Girl Scouts, YMCA, YWCA, etc.)
50. Specialists in career education evaluation, K-12

FIGURE 2-3: List of Consultation Specialty Areas

SECTION 3:
Promoting the Service

I gave a two-day workshop to junior high language art teachers, representing all the junior highs in Seattle. Then, two schools asked me to consult with department heads and administrators to help them put the (Seattle) Guidance goals into their curricula. Following that, one school is having me do a workshop for the entire staff on the advisory Guidance Program. This seems to point up the benefits of the Northwest Connection: going from one enthusiastic teacher to a whole staff, which, in turn, benefits a whole school.

Junior High Counseling Consultant

Peer assistance is an excellent concept–if it is used. Other efforts have operated with minimum benefit because services were not requested. It is demoralizing when people who are trained and expect to provide a useful consultation service receive no requests for their services. Awareness–public relations–activities are absolutely essential if the expectations of consultants and benefits to users are to be met. Plans must be made in several key areas:

1. Who are the potential users of the service?
2. What information should be given to potential users?
3. Who should take responsibility for awareness activities?
4. What awareness techniques should be used?
5. How long will it take before services are used?

Use

It is important to have a clear idea of who will use the services. Thinking about awareness activities from the user's point of view will strengthen the process of planning to get the service used. Focus on questions like these: Who is likely to make a request? What service is likely to be requested? Are there several different types of people who are likely to make requests? Are their needs and interests likely to be different?

The Northwest Connection targeted on two major groups–educators and community organizations. The primary education audience was at the school building level: teachers, counselors, specialists and building administrators in public and private schools. District level personnel, including the Board of Education, superintendent and central office staff, became a secondary audience. A third education-related audience was regional (within state) service center personnel. State level personnel, including state boards of education, chief state school officers and state department directors and specialists, were also a target audience. Finally, regional (multistate) services such as the Northwest Vocational Curriculum Management Center were considered a target audience for information.

The other major group of users was community people with an interest in career education, and included such groups as chambers of commerce, organized labor, youth-serving agencies and large and small businesses.

A list of all contacted, with the technique used to contact them, is shown in Figure 3-1. This chart provides a good overview of the awareness activities undertaken.

	TECHNIQUE USED													
AUDIENCE	Letter from Chief State School Officer and Brochure	Letter from Project Director and Brochure and/or Guide to Consultant Services	Letter from State Career Education Coordinator and Brochure and/or Guide to Consultant Services	Letter from Consultant and Brochure and/or Guide to Consultant Services	News Articles in State Education Newspapers	News Articles in Local Newspapers	Personal Contacts by Consultants	Personal Contacts by State Career Education Coordinators	Presentation by Project Staff	Presentation by State Career Education Coordinators	Presentation by Consultants at Conferences	Television Show by Idaho Dept. of Education	Personal Contact by NWC Client
Local School Building Staff Through Principal													
District Level Personnel Through Superintendent													
Regional (within state) Career Education Coordinators													
Local Career Education Coordinators													
State Level Specialists													
Subject Area Associations													
Career Education Associations													
Administrator Associations													
Regional (multi-state) Service Centers													
Local Chambers of Commerce													
Local Youth Serving Agencies													
Parent Associations													
Business Related Organizations													
Local Affiliates of Organized Labor													

FIGURE 3-1:
Awareness Techniques Used with Target Audiences

Deciding What Information Users Need

In planning specific awareness information for each target audience it is necessary to make some assumptions about their roles. The Northwest Connection Project made the following assumptions:

- The school building principal, as the instructional leader, should know about available services in order to provide accurate information to building staff and to encourage staff to request services. Information should go to teachers through the principal.
- School superintendents, who control the activities of the district, should know about the services, provide information to district level staff and principals to have staff members request services.
- Individuals should have all the information they need to select a consultant and apply directly to the consultant for service.
- People from businesses, organized labor and other community agencies should be told about career education and encouraged to become involved.
- Project staff (NWREL) should develop basic information for use by all individuals doing awareness activities and also provide assistance to individuals who request help in developing special information for selected audiences.

Based on these assumptions, the project staff developed these awareness materials:

- A project brochure that described the purposes of the Northwest Connection, the services available and how to get more information
- Two inserts for the brochure, one listing the names, addresses and telephone numbers of Northwest Connection consultants, and one giving a general overview of career education
- A *Guide to Consultant Services* that described in detail the services offered and how to request them, gave a profile of each consultant, indexed consultants in various ways (geographic location for example), and included a poster to announce the services as well as postcards that would be used to request services. Sample pages from the *Guide to Consultant Services* are shown in Figure 3-2.
- A series of transparencies to be used in presenting the Northwest Connection to groups of potential users
- Sample news releases describing the services, to use in local newspapers, school newsletters and other publications
- Sample form letters to use with various target audiences

Assigning Responsibilities for Awareness Activities

Public relations activities should be undertaken by the individuals who can achieve the greatest effectiveness. Many times this will be the people closest to where the services will be offered (assuming that individuals undertaking awareness activities have the skills for such efforts and are motivated to "sell" the services).

Responsibilities for getting services used were divided among project staff (NWREL), state career education coordinators and consultants. See Figure 3-3. The project steering committee was also asked to play a role in public relations efforts.

Consultants were asked to contact education and business groups in their immediate area and other groups related to their consultant specialty throughout the region. Figure 3-4 shows a sample letter of contact. For example, the consultants specializing in career education for special education students were asked to contact related professional associations and other special education teachers. State career education coordinators were asked to inform their contacts of the project. NWREL project staff was responsible for all region-wide (multistate) general awareness activities, coordination of activities among all levels and pro-

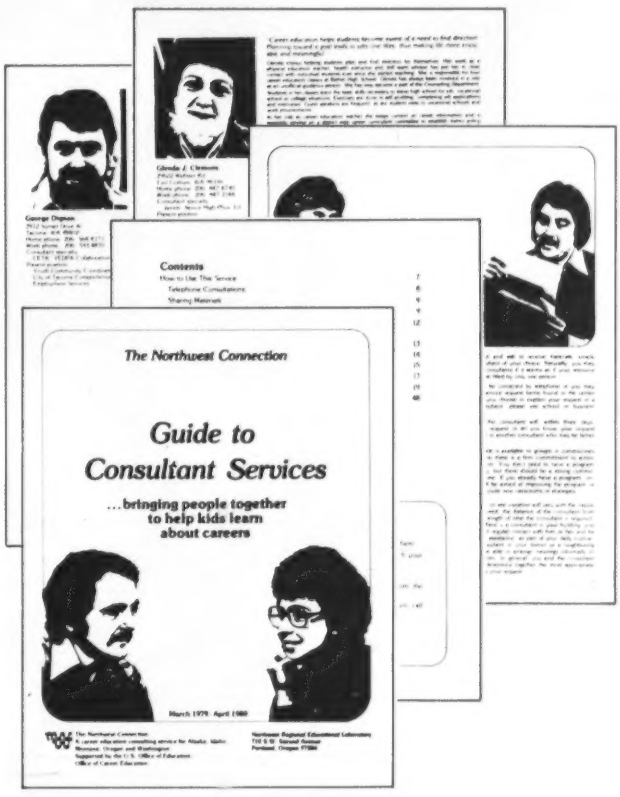

FIGURE 3-2: Guide to Consultant Services

viding support to state level personnel and consultants. Satisfied clients also were instrumental in getting services used. This was unanticipated, but effective. When users of a service recommend it, others tend to respond.

Awareness Techniques

Several awareness techniques were used in the Northwest Connection, with mailings the backbone of the effort. Figure 3-1 shows the techniques used with various audiences. The major techniques are described below:

- Three mailings were sent to every superintendent, principal, head teacher and regional (within state) and local career education coordinator in the five-state region served by the Northwest Connection. The mailings included project materials and letters from prominent administrators encouraging use of the service. Each mailing included updated information about the project.
- One mailing was sent to executives of every local Chamber of Commerce in the region. The mailing included project materials and a cover letter signed by the Northwest Connection consultant representing Chambers of Commerce.
- State career education consultants made personal contacts with other specialists in their state departments to describe the Northwest Connection and encourage people to use or promote use of the services.
- Individual consultants made presentations to nearby schools and school districts and to regional (within state) and statewide conferences.
- The project director sent personal letters to executives and/or elected officers of all school administrator associations in the region (multi-state). The letter encouraged the association to use and recommend use of the Northwest Connection service to its members.

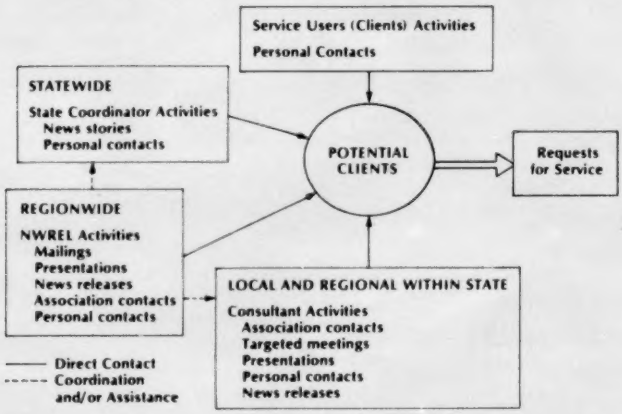

FIGURE 3-3:
Northwest Connection Awareness Processes

- A television program was developed in one state and aired throughout the state and in contiguous states.
- Project staff made presentations to career and vocational education advisory groups, career and vocational education conferences and many other groups related to career education.

The activities described are only some of the key efforts. Individual consultants, state and regional (within state) education personnel and others planned and carried out many more awareness activities.

Timing Awareness Activities

Timing for the Northwest Connection was not coordinated with the school year cycle. The service was announced in mid-March with start-up April 1. Because the project did not coincide with the school planning cycle, it took approximately eight months for requests to reach a level that met the expectations of project staff. The time to reach an optimal level would be an additional several months. In order to get early requests, consultants and state department people had to make very strong and specific recommendations to schools and districts where there was a known interest and commitment. Remember, getting people to use the service–even if it is free–takes time.

a career education consulting service for
Alaska, Idaho, Montana, Oregon, and Washington
the northwest connection

April 3, 1979

Dear Career Education Coordinator:

This communication is to introduce ourselves to each of you. We are local career education coordinators who are serving on the team of 58 consultants with the Northwest Connection - a regional career education consulting service.

Enclosed is a brochure and a poster that describes the project and services. You will receive a Guide to Consultant Services in the next few weeks and this will provide specific information on the services available, how to use the services, and all consultants available to you. The brochure and Guide are being sent to every superintendent and principal in your state so people in your district will know about the Northwest Connection.

We hope that you will use the brochure and Guide to brief your local career education advisory committee about the project. Please request brochures for members if you think they would like copies. Call Bob Blum at Northwest Regional Educational Laboratory toll free 1-800-547-0362 (in Oregon 1-800-452-5158) if you want additional brochures or posters.

To best serve you, we have combined our resources and areas of expertise and are in the process of developing strategies and activities to use in answering your requests for service.

We sincerely hope you will call on either of us in the near future and we will do our best to assist you in the implementation of career education in your local district.

Sincerely,

Phil Burkhart
Career Ed. Coordinator
Pocatello School District
Box 1390
Pocatello, Idaho 83201
(208) 232-1563

Bernie Griffith
Career Ed. Coordinator
Cashmere School District
Cashmere, Washington 98815
(509) 782-1950

Northwest Regional Educational Laboratory
710 S.W. Second, Portland, Oregon 97204 (503) 248-6864

FIGURE 3-4: Sample Letter of Contact

SECTION 4:
Training the Consultants

During my onsite in Butte, Montana, I could tell I had walked into a negative situation. The music teachers had been forced to come, and they had minutes before been in an explosive meeting. Using techniques of the Northwest Connection, especially Team Planning, they really got into the idea of how to make it work in their community and had set up some excellent group as well as individual projects to try.

Junior/Senior High Music Consultant

Although people were selected as consultants because of their achievements in their specialty areas, they did not necessarily have consultation skills. It is essential to decide what services consultants will provide, identify the skills needed to provide the services and then design training to develop required skills. It is also important to involve those to be trained in the planning process. Key questions needing answers are:

1. What should the content of the training be?
2. What will the training stretegies be?
3. Who should do the training?

Training Content

Training should make the consultants confident that they can do what they are expected to do. The content of training must be tailored to the needs of the group and individuals within the group. The Northwest Connection staff assumed that people chosen to be consultants already knew how to integrate career education into their subject area or work responsibility. Project staff also knew that while the idea was for consultants to serve others in positions exactly like their own, at times individuals would probably work with others in positions that were only similar (e.g., first grade teacher helping a K-6 staff). It was also assumed that consultants would have to work with mixed groups (administrators, teachers, parents, business/labor representatives) in problem-solving situations. In order to prepare the consultants to face the variety of situations expected, the training was designed to build generic consultation skills related to a planned consultation process. The process includes the following steps:

Establishing a relationship

- Introducing self and service
- Gaining client (requestor) respect and response
- Diagnosing and/or clarifying client needs

Planning action steps

- Systematically looking at client needs and possible approaches to filling requests
- Reviewing resource requirements and identifying potential resources
- Planning specific steps and determining responsibilities
- Anticipating problems
- Considering budget and other resource constraints
- Setting operational objectives
- Organizing to deliver services
- Designing and developing materials
- Getting necessary approvals

Delivering services

- Assembling resources
- Searching for information
- Sending information, including instructional materials
- Referring clients to other resources (human and materials)
- Delivering inservice training
- Working through problems with groups
- Handling questions of logistics and resource allocation
- Handling crises
- Setting up exchange programs
- Modeling consultant skills
- Providing psychological support for action
- Facilitating goal accomplishment and re-statement
- Soliciting interim feedback on successes and problems

Following up after initial services

- Calling clients to check progress
- Making additional visits

- Sending new information related to client need
- Keeping records of services
- Submitting expenses and other reports

Evaluating services and client successes

- Describing evaluation procedures to clients
- Encouraging clients to do evaluation
- Evaluating services provided
- Describing their own reactions to the program

The consultant also had to know about the resources available for use in delivering service. Resources such as the National Center for Career Education, the ERIC Center for Adult, Vocational and Career Education, The Nothwest Regional Exchange and JDRP-approved career education programs were introduced.

Training also focused on career education in each of the five participating states where consultation would be done. Consultants were expected to know the philosophy and approach to career education so that consultant efforts supported and extended work in the states.

Training Strategies

The consultant training design is shown in Figure 4-1. It is based on the belief that multiple contacts were necessary to foster the growth of consultant skills. The four phases in the training design are:

1. Awareness–Initial training to develop the skills and understanding necessary to carry out consultant work
2. Trial–Initial consultations to give individual consultants a chance to see the kinds of requests they would get and the skills they needed to respond

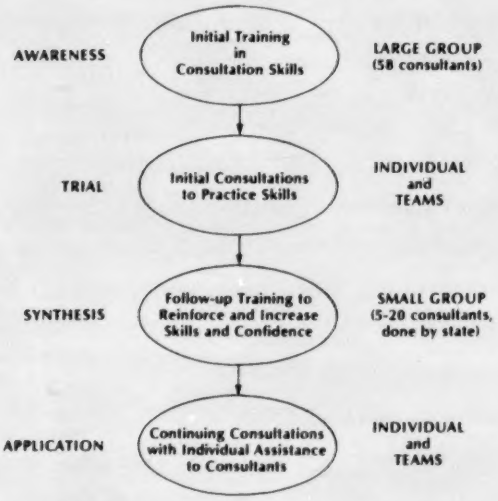

FIGURE 4-1: Northwest Connection Training Design

3. Synthesis–Followup training to increase consultant skills and knowledge, improve project procedures and begin to integrate consultant services into state plans and procedures
4. Application–Continuing consultation service with project staff working individually with consultants to solve problems they encounter.

The initial training session was planned to start knowledge and skill development in all content areas and to begin to build "esprit de corps" among the consulting team. Large and small group activities were conducted, along with ample opportunity for debriefing.

The followup training was done in smaller groups within each state. Each of the followup training sessions was tailored to meet the needs of the specific groups. Skill development was continued, and the consultants took a much more active role in the followup training sessions.

Selecting Trainers

The approach and style of the trainers is a key element in successfully achieving training goals. Trainers must also be experienced and skillful in the content areas included in the agenda. Trainers for the initial training workshop were chosen for their proven expertise in consultation and training. A person was chosen in each major consultation skill area, including creating awareness of consultation services, assessing client needs, planning with clients, facilitating group problem solving, conducting one-to-one consultation and evaluating consultant services. The seven-person team became the training planners. They helped design the overall session, planned and delivered their specific sessions, planned revisions to the training on a continuing basis and made themselves available for individual discussion and assistance to trainees. The state career education coordinators and people representing major career education resources also participated as trainers. The project staff were among the seven who planned training and conducted sessions; they also coordinated the total training effort.

In the followup training, consultants assisted project staff and conducted some of the training. State education coordinators also played an important role.

SECTION 5:
Making the System Work

My consulting experiences were by telephone, easy and relaxed, yet very satisfying. No one stands out as an example. I spent more hours working in my community to further the concept and value of career education.

Parent Involvement Consultant

Having a smoothly functioning system is as important as having skilled consultants and effective awareness techniques. The system must be designed so that a range of potential client needs is addressed in a reasonably quick and efficient manner. It is important that clients be made aware of how their inquiries will be handled, particularly in a new system such as the Northwest Connection. For example, clients will want to know such things as how long they will need to wait for materials; who will make a decision regarding onsite visits; and whether there are any paperwork requirements. Clients will usually not balk at delays or even paperwork if requirements and expectations are set forth in advance.

In order for consultants to be able to respond confidently to client questions, they must have clear communication with the central project office and clear expectations of the kinds of support they will receive.

Based on Northwest Connection experience, the key questions you need to answer are as follows:

1. What services will be offered?
2. Will inquiries and requests for service be screened for appropriateness? for referral?
3. Will consultants be paid an honorarium for their services?
4. What recordkeeping will be required by consultants?
5. How will communications with and among consultants be established and maintained?

Screening

We decided at the beginning of the project that we would encourage clients to make inquiries about services directly to consultants. When inquiries came to NWREL, we would suggest that the caller choose a consultant to call (or, if necessary, we would mail the caller a *Consultant Guide*). In some cases we would suggest consultants by name, but we preferred to have the caller choose the consultant.

The consultant was expected to judge the appropriateness of the inquiry and decide how to respond. In some cases, consultants called NWREL for advice, especially when clients made requests that seemed beyond the scope of the project. Such requests usually involved a large amount of written materials. With such support, consultants quickly learned how to respond. Apparently, consultants trusted that NWREL would support, and not undermine, decisions they had made.

However, this approach did not guarantee that every consultant had an opportunity to consult. Furthermore, some particularly enthusiastic consultants took on more work than they could comfortably handle. Despite these drawbacks, we believe that consultants learned more by having to make critical decisions and by having to deal with a heavy workload than they would have learned if the process had been tightly controlled.

Pay

Our decision was to forego honoraria to consultants. It is possible that the sums of money that could have been earned this way would have provided an incentive to develop new clientele. But the possibilities for conflicts of interest and the threat of commercialization of the process seemed to strongly outweigh any benefits that might be realized.

Our experience with this appears to support the idea that the professional growth that takes place in the consultant role is more than adequate incentive to serve.

Support

The project offered both logistical and financial support. Most consultants lacked adequate facilities to handle large scale mailouts to announce their availability as consultants or to duplicate materials. Others did not have easy access to a telephone. In cases where consultants needed assistance with mailouts, acquiring materials, copying, reimbursement for telephone expenses (see financial support below), we were able to provide required support.

At the beginning of the project, we developed a Consultant Tool Kit, an accordion box containing materials consultants would need to do their job in a reasonably professional way. The contents all had a logo that identified the project, and included:

- a memo pad
- business cards (consultants wrote in their own names)

- sample letters announcing the service
- sample form letters
- required forms (See *Recordkeeping* below)

Recordkeeping

If you were to ask some of the consultants, they would probably respond that recordkeeping for this project was designed to use as much paper as possible, to require more information than anyone would ever need, and to provide a minimum of space in which to write required information!

However, from the point of view of project staff, the recordkeeping system was streamlined and efficient; the number of required forms was held to a minimum and information was requested only for purposes of reimbursement of expenses, encouraging sound planning and monitoring activities for project evaluation. We used the following recordkeeping devices:

1. A form to assist with planning onsite consultation activities likely to cost in excess of $75.00
2. A Consultant Log, required monthly, designed as a tool to collect information on consultant activities
3. A service evaluation form which was on a postcard and designed to be mailed by a client to NWREL
4. An expense reimbursement form

See *Attachments* for examples.

To ease the accumulation of paperwork for consultants, we encouraged them to use the toll-free line to submit information related to the Consultant Log. Project staff recorded and filed this information.

Communications

Several methods were used to maintain communication with and among consultants. The primary tool was the toll-free telephone line which gave both consultants and clients easy, free access to the project for any reason. As suggested above, the toll-free line was also used by consultants to take care of certain recordkeeping requirements. We also published a monthly newsletter, *Communiqué*, (see Figure 5-1) in which we described consultant activities and shared information.

It was also important that consultants keep state career education coordinators informed, especially when consultants were planning an onsite visit. To be sure a state coordinator knew about a site visit, we required the coordinator's signoff on the onsite planning forms.

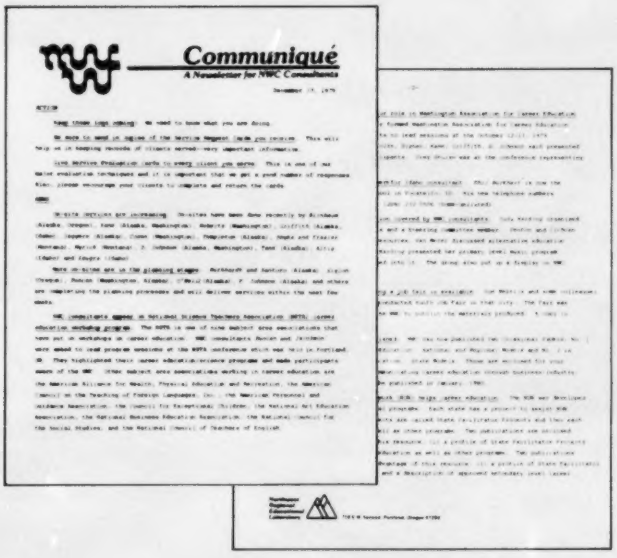
Communiqué
A Newsletter for NWC Consultants

FIGURE 5-1: *Communiqué*, the NWC Newsletter

SECTION 6: Considerations in Establishing Peer Assistance Models

I very much enjoyed the positive atmosphere. I very much enjoyed meeting people involved with career education. I now have many contacts and have been able to greatly expand my knowledge and materials available in career education.

Primary Grades Teacher Consultant

In the Northwest Connection, several key decisions about how the project would be operated were made by the funding agency (the Office of Career Education in the U.S. Office of Education), and were presented as "givens" in the RFP for the project. These "givens" shown below will show the reader the kinds of decisions that must be made and some of the tradeoffs that may be involved when establishing peer interaction systems.

Geography

The Northwest Connection was planned to test a *regional* approach to the delivery of consultant services. The assumptions underlying the regional approach seem to be (a) no single state has all the consultant resources necessary for a comprehensive model; and (b) a national model (serving all 50 states) would be too cumbersome to establish and maintain without some experience gained at the regional level.

Specialties

The USOE requirements for this project specified that one consultant would be selected in each of 50 specialty areas. In many cases, however, general requests for service were often made of consultants. The consultants were not always certain of whether they should present themselves as specialists or generalists. Furthermore, most consultants had more than one area of expertise, even though they were selected for one specific area of expertise.

Payment for Services

In the Northwest Connection, project funds were to be used to cover the costs of providing consultant services. There are many alternatives, however. For example, consultant costs could be borne entirely by the client. Or, individual states, counties, locales or other jurisdictions served by the project could contribute to a pot of money that clients could tap for funds to purchase consultant services. A cost-sharing process using a combination of these two alternatives could also be established.

Timing

The Northwest Connection was established as a demonstration project with specific start and end dates. With a regional project, as this one was, involving people new to the consultant role, 16 months is an absolute minimum amount of time to allow for (a) the establishment of the consultant network and the training of the consultants, and (b) the development of the momentum for the project to be operating on a routine basis. If a consultation network were set up within a state, the time line required for these things to take place would be shorter; if set up within a region where states were unaccustomed to working together (in the Northwest, the five participating states had a history of cooperation), the timeline would be longer. A nationwide consultation network should probably be developed from successful components operating regionally.

Timing of Services

Northwest Connection services were to begin within a certain number of months after the signing of the contract with the funding agency. Consultant services were available immediately after initial consultant training–early March 1979. Since the school year ends in late May or early June, consultants were developing awareness of a service that would not be used until the following autumn.

Project planning should take into account the most useful starting time for consultant services in terms of likely needs. Training and other activities should be planned so that the project will have maximum impact at the time of maximum need.

Turnover

With the exception of one person, all of the consultants in the Northwest Connection remained active to the original ending date of the project. However, when a four-month, no cost extension was approved, some consultants were unable to continue providing their services. They either had other plans or felt "burnt out." Unaware of this, clients continued to contact the consultants, who in all cases responded enthusiastically when they could be reached.

However, when setting up anything but a short term project, you should consider procedures for handling consultant turnover and for selecting new individuals to fill the vacancies that will naturally arise. The consultant role is a demanding one, and you should be prepared for individuals to leave the program either because they need a rest or because new opportunities have become available to them.

SECTION 7: Peer Interaction: Review of the Literature

It was the sharing that occurs when two teachers of the same grade level get together, discuss concerns and find alternatives and solutions — one-on-one consultation. The important element is the matching of first grade teachers with first grade teachers, etc.

Primary Grades Teacher Consultant

The Northwest Connection was based on several hypotheses about the effectiveness of peer interaction in communicating information about career education:

- Communication among peers is enhanced because peers frequently share the same background and/or experience.
- Communication among peers is efficient because questions about meaning and intentions are not as likely to arise. Having a common vocabulary gives peers more time to spend dealing directly with tasks rather than with defining terms.
- There are strong incentives for peers to trust one another. Without trust, it is unlikely that useful communication can take place.

These hypotheses were confirmed during the operation of the Northwest Connection. Over and over again, we were told that teachers profited by learning about career education from others who had faced similar problems. We heard consistently good feedback about the relevance and utility of the materials that consultants supplied. And we found indirect evidence that consultants established friendly, informal relationships with clients that greatly facilitated task accomplishments.

This section reports briefly on the extent to which our hypotheses about peer interaction are supported by existing literature. The literature on peer interaction as a method of disseminating information about career education is scant. A wealth of information is available on peer teaching and peer influence, but these concepts are not directly related to career education.

Since the proposal to establish the Northwest Connection was written, only one article has come to the attention of project staff that directly relates to the concept of peer interaction. (Pauline S. Rauls, "Helping Teacher: A Model for Staff Development," *Teachers College Record* 80 (1), September 1978, 157-171.) In this article, Rauls describes the role of a "professional staff member whose primary function is to assist other teachers in a peer-support role with the emphasis on improving their performance in actual classrooms" (p. 158). The person in this role is called a "helping teacher," and essential to the idea is "the local district use of experienced teachers as resource people and problem solvers for local district staff development efforts" (p. 159).

Although a large body of literature on peer interaction to spread innovations does not exist, the U.S. Office of Career Education has recently funded several projects that lend strong support to the peer interaction concept.

A number of exemplary projects in methods and techniques for training and retraining teachers rely heavily on peer interactive processes. For instance, the "Changer Model for Career Education" implemented in Nampa, Idaho, in FY77 found four factors that contributed to project success:

1. Teachers who received training were chosen by their peers.
2. Teachers themselves, instead of administrators or curriculum specialists, received training in techniques of infusing career education in their classes.
3. Building-level facilitators and data gatherers helped maintain awareness of the project, while trained teachers provided know-how and resource expertise to other teachers in the district.
4. Training involved hands-on activities that were instrumental in helping teachers see career implications of their subject matter specialties.

In general, these OCE-funded exemplary projects stress structured peer interaction, emphasis on a team approach that always includes (though is not limited to) teachers in a key disseminating role and use of several communication techniques to back up the face-to-face interaction.

While evidence appears to support peer interaction as a method of spreading effective career education practices, the experience of the Northwest Connection also poses several questions, including the following:

- What are the most important factors in being perceived as a peer? For instance, are teachers peers when they teach the same grade, have the same subject specialty area, reflect the same approach to teaching, or some combination of the above?

- If consultants work with community groups, are there group members who will not regard the consultant as a peer?
- Does too rigid an adherence to the concept of peer interaction limit the potential effectiveness of a consultant? Does it limit the audience with whom she or he can work?

In summary, the idea of peer interaction as a method of promoting the improvement of career education has received strong confirmation by the Northwest Connection. At the same time, the theoretical underpinnings of peer interaction, especially as these relate to an understanding of the boundaries and limitations of peer interaction, remain to be carefully studied.

Attachments

NO POSTAGE NECESSARY IF MAILED IN THE UNITED STATES

BUSINESS REPLY MAIL

FIRST CLASS P

POSTAGE WILL B

The Northwes
Northwest Re
710 S.W. Sec
Portland, OR

NWC SERVICE EVALUATION

Name (optional)_____
Position_____
Organization_____
Address_____
_____
Telephone (optional)_____

Service Requested Date of
Materials ☐ Request_____
Telephone Consultation ☐ Consultant
On-site Consultation ☐ _____

Service Received_____
_____
_____
_____

Date of Service_____

The service provided met my needs
Check one ☐ well ☐ somewhat ☐ little

Timeliness (Was the help provided when it was needed?) ☐ good ☐ fair ☐ poor

Relevance (Was the help related directly to what you needed?) ☐ good ☐ fair ☐ poor

Utility (Was the help useful to you and others?) ☐ good ☐ fair ☐ poor

Comprehensiveness (Was the help adequate to meet your needs or get you off to a good start?) ☐ good ☐ fair ☐ poor

What additional services, if any, would you like_____
_____
_____
_____

How might we improve the service?
_____
_____
_____

CONSULTANT LOG

Consultant Name _____ Reporting Period _____ to _____ Page _____ of _____

Date	Mode*	Contact Person	Telephone	Organization and Address	Description (purpose, service provided, etc.)	Follow-up Needed	Time Spent	Cost

* TI – Telephone Incoming MI – Mail Incoming PI – Person coming to you (visitation to you)
TO – Telephone Outgoing MO – Mail Outgoing PO – You going to person (on-site work)

White Copy - NWREL Canary Copy - Consultant

NWC ONSITE PLANNING FORM page 2

Client Tasks and Resources

Tasks / Resources

20. Task (Specifically, what will the client do?)	Proposed Completion	Completed	21. Item (Specifically, what will the client provide?)	Cost Estimate	Actual Cost
Planning Tasks:					
Delivery Tasks:					
				TOTAL COST	

22. Evaluation (How will you know if the service has been effective?)	23. Consultant Comments:

ONSITE SERVICE PLANNING FORM

page 1

1. Consultant	2. Priority No.	3. Date for Service	4. Duration of Service	5. State Coordinator Agreement	6. NWREL Approval	7. Total NWC Cost Estimate

8. Person Making Request | 9. Telephone | 10. School/Organization

11. Contact Person (if different) | 12. Telephone | 13. Street Address | City | State | Zip

14. Summary of Service (In general, what will you do?)

15. Target Audience (In general, who will you serve?)	16. Rationale for Service (Why is the service needed? What is the basis for the priority assigned?)	17. Objectives of Service (What outcomes will result from the service?)

Consultant Tasks and Resources

Tasks / Resources

18. Task (Specifically, what will you do?)	Proposed Completion	Completed	19. Item (Specifically, what will you need and provide?)	Cost Estimate	Actual Cost
Planning Tasks:					
Delivery Tasks:					
Follow-up Tasks:					
				TOTAL COST	

White Copy - NWREL Canary Copy - Client Pink Copy - State Coordinator Goldenrod Copy - Consultant

EXPENSE LIST

Please keep track of all NWC expenditures on this form. Submit the list, receipts and a signed Expense Report Form monthly (but not unless you have at least $20.00 in expenditures). Northwest Connection staff will transfer your expense list onto the Expense Report Form and process it for payment. You must submit a receipt for any expense over $10.00.

Item	Date of Expenditure	Purpose	Computation	Amount to be Reimbursed	Receipt Attached
			TOTAL		

White Copy - NWREL
Canary Copy - Consultant

Acknowledgments

This guide is the result of the efforts of many individuals. The Northwest Connection Steering Committee reviewed outlines of the guide and provided valuable conceptual input. Robert E. Blum and Greg Druian wrote the text. Susan Applegate handled the graphics, and Nancy Carter coordinated production of the guide. Levonia Trotter typed the guide in both draft and manuscript form.